

Exclusive Training

How To Use **Sunvoy** To Crush Your Company Goals



SUNVOY

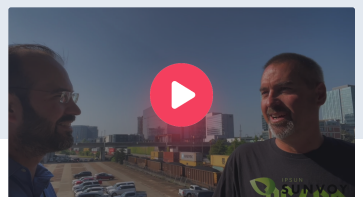
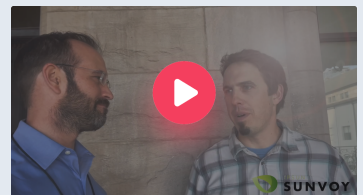
Sunvoy for CEOs & Leadership

Sunvoy comes with a lot of functionality and plenty of benefits for all of your team members within your solar company, but in this particular training we want to focus on the most important features for Founders, C-Level Executives & Managers:

- **Understand the business value of Sunvoy**
- Set goals for the next 3, 6 and 12 months for Sunvoy's company wide implementation and usage
- **Learn how to use the Dashboard to measure company wide KPIs**
- How to make sure your team gets the most out of Sunvoy and actually uses it
- **Why urgency to make the most out of Sunvoy needs to come from management**
- How to generate extra business through referrals and better reviews
- **How to generate extra revenue through reselling Sunvoy & offering lifetime active monitoring**
- How to get your own app in the Apple & Google App Stores

Executives like you love Sunvoy

[Click here to find out](#) what some of the largest solar installers in the country and worldwide love about Sunvoy.



The Business Value of Sunvoy

Sunvoy implements a **powerful flywheel within your Solar Installation Business** that starts generating happier customers and employees through an **improved customer experience**, leading to more 5-Star Reviews and Referrals that **generate more business for you**. Restarting the process all over again while your company continues its growth trajectory through an automated process.



The best? It takes very little maintenance from you and your team after initial implementation as it runs almost completely in the background.

Some Results other companies generated by implementing Sunvoy:

43

Referrals

405

active customers

\$967,500

referral revenue*

11%

Referral rate



SHINE SOLAR

36

Referrals

1,185

active customers

\$810,000

referral revenue*

3%

Referral rate

* estimated over a 12 months period at an avg. system size of 10kW and 75% referral conversion rate

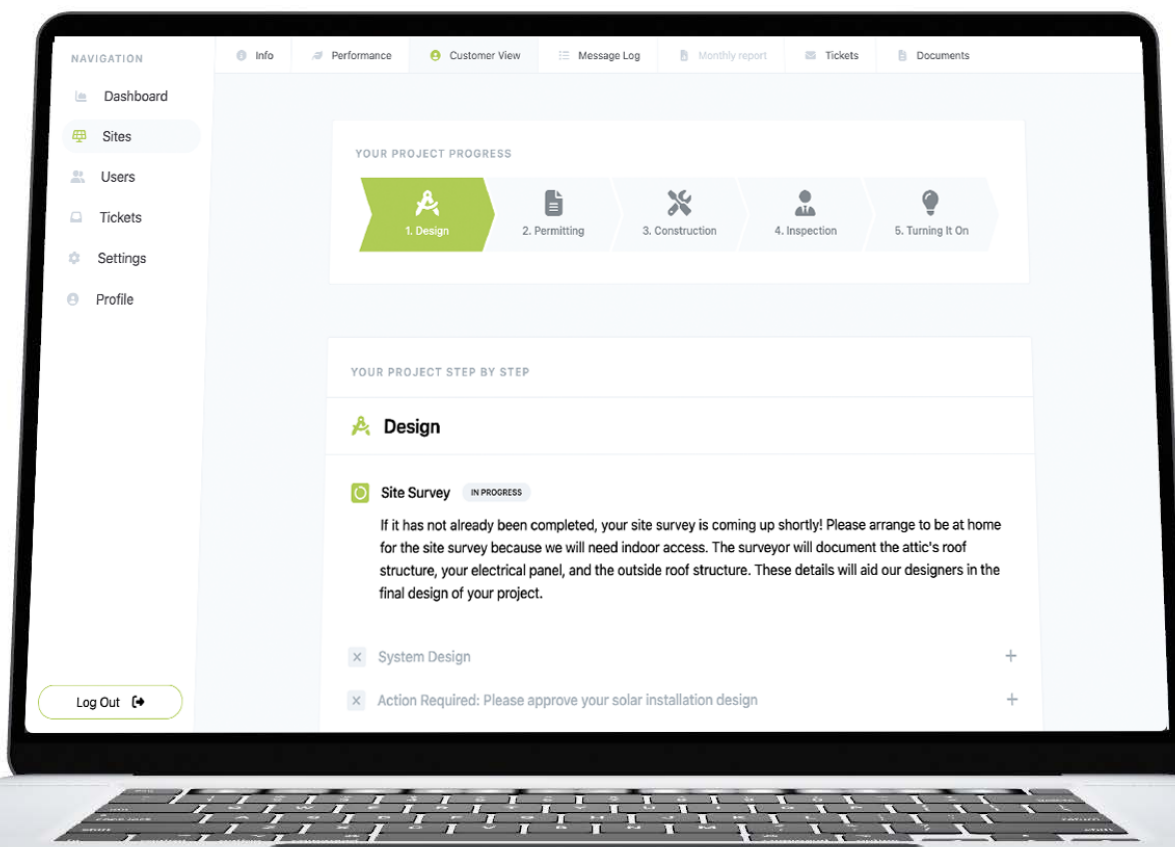
Let's have a quick look at each component of the flywheel in detail:

Better Branding & Customer Experience

If you were to guess a stock that performed 10 times better than the S&P 500 over the same period you **would be surprised it's Dominos Pizza.**

One of the reasons is its focus on digitalization, implementing a virtual pizza tracker that shows the customer exactly where their pizza is after they order and before successful delivery.

Solar on the other hand with a cost several magnitudes larger than ordering a pizza is **still stuck in the digital stone age**. Sunvoy changes that by **giving your customers the same or a better digital experience they have grown to expect from their day to day life**. Displaying them exactly where they are in the process of going solar.



More 5-Star Reviews & Customer Advocates

The majority of bad reviews can be traced back to poor or non-existent communication when something went wrong. But once the process of going solar is streamlined **and transparently communicated to the customer** so they never wonder where exactly they are in the process it **naturally leads to happier customers that leave better reviews.**

Especially if you explicitly, repeatedly and automatically ask them for it in key steps of their customer journey, for example right after their system has been installed, they have indicated a positive experience or they have just talked to a crew member in person.

More Referrals

Happier customers leave more referrals. Word of mouth continues to be the most effective marketing channel, especially if you consciously optimize your customer experience for it.

Reminding your customers even years after you have originally installed their system is a crucial component of that. As is continuously providing value, day after day over the 25 years lifetime of the solar system your company has installed.

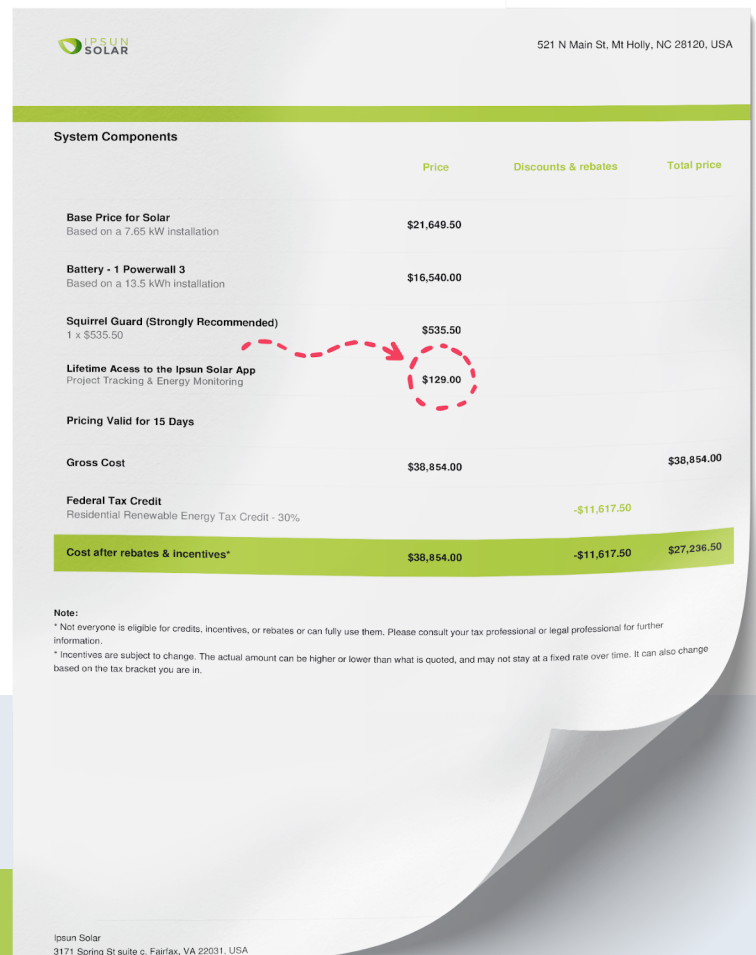
Sunvoy does that by continuously bringing your customers back into your app, putting your company logo front and center and reminding them who to thank for their energy savings and green produced energy.

Resell at markup

Sunvoy already “soft” pays for itself by generating more referral business for your company and reducing cost of acquisition. But it can even “hard” pay for itself literally, if you decide to sell access to your own app at cost or at a markup like other Sunvoy customers have done successfully in the past.

On avg. we have seen a **>90% attachment rate** (the percentage of solar customers which purchased access to the installers app at a markup) after **adding a line item to every sales proposal** that says “Lifetime Access” for prices running between \$129 and \$300.

Any kind of markup over the retail price of Sunvoy (\$95) only adds an almost neglectable increase to the cost of an avg. sized 10kW system for the homeowner:



System Components	Price	Discounts & rebates	Total price
Base Price for Solar Based on a 7.65 kW installation	\$21,649.50		
Battery - 1 Powerwall 3 Based on a 13.5 kWh installation	\$16,540.00		
Squirrel Guard (Strongly Recommended) 1 x \$535.50	\$535.50		
Lifetime Access to the Ipsun Solar App Project Tracking & Energy Monitoring	\$129.00		
Pricing Valid for 15 Days			
Gross Cost	\$38,854.00		\$38,854.00
Federal Tax Credit Residential Renewable Energy Tax Credit - 30%		-\$11,617.50	
Cost after rebates & incentives*	\$38,854.00	-\$11,617.50	\$27,236.50

Note:
 * Not everyone is eligible for credits, incentives, or rebates or can fully use them. Please consult your tax professional or legal professional for further information.
 * Incentives are subject to change. The actual amount can be higher or lower than what is quoted, and may not stay at a fixed rate over time. It can also change based on the tax bracket you are in.

Ipsun Solar
 3171 Spring St suite c, Fairfax, VA 22031, USA

Ipsun Solar Results:

97%

attachment rate

\$129

retail price

\$45,021

additional revenue*

12 months

period

* At 30 solar systems sold per month over a 12 months period

Offer Lifetime Active Monitoring

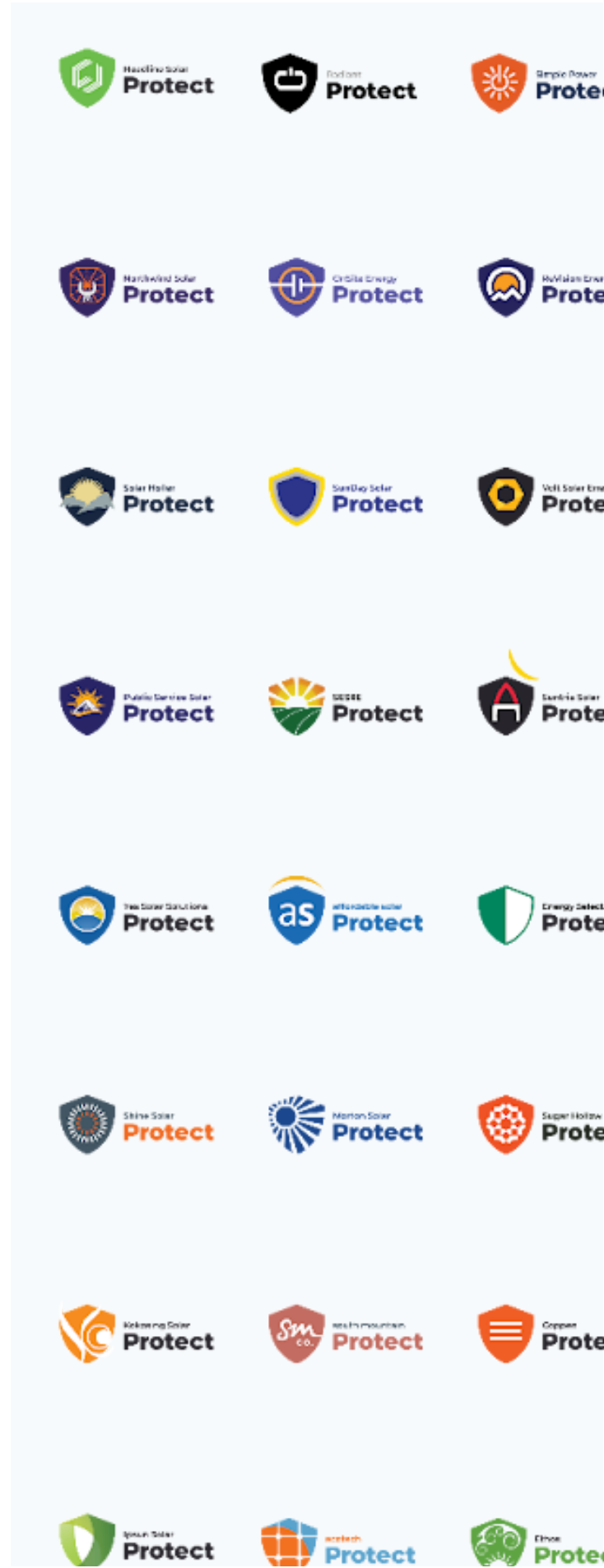
Instead of just reselling Sunvoy at a Markup, you can also decide to [implement your own "Lifetime Active Monitoring" plan](#) using Sunvoy.

[Ipsun Solar is another example for implementing this successfully](#), selling their "Ipsun Platinum Protection Plan" at \$0.10 a Watt or \$1,000 for an avg. 10 kW sized solar system. With an 80% attachment rate they generated over \$250,000 in additional revenue used to staff their maintenance department in the first year alone.

This did not just make a noticeable difference in how they could handle service calls outside workmanship warranty, but also led to happier customers that felt well taken care of beyond the installation and generated more word of mouth referrals as a result.

Sunvoy makes this simple **by providing you with everything necessary, from the monitoring capabilities to marketing assets and sample contracts.**

No other third party tool or service like Omnidian or Solar Insure even necessary.



Additional Benefits

Beside the countless of hard benefits like more 5-Star Reviews, a better customer experience that leads to more referrals and even generating additional high margin revenue through reselling access to your own app or through lifetime active monitoring Sunvoy also comes with many “soft” benefits that are **harder to quantify but exist nevertheless:**

- **No more context switching for your employees, instead they have all relevant information available in a single place**
- Cleaning up and gaining clarity on your data as for the first time you will have CRM and Inverter data displayed side by side
- **Clarity and streamlining of your installation process as many installers for the first time stop to “think” about how their business actually operates as they are integrating Sunvoy**
- No more “off-brand” communication, with standardized message templates that get send even if project managers are out of office or forgot about a particular customer
- **Associated time savings for your employees by automating customer communications and finding all information in a single place**
- Easy to switch between different software and hardware vendors with 50+ solar specific integrations already build into Sunvoy
- **Improved customer experience as customers have a single point of contact for everything solar within your app**

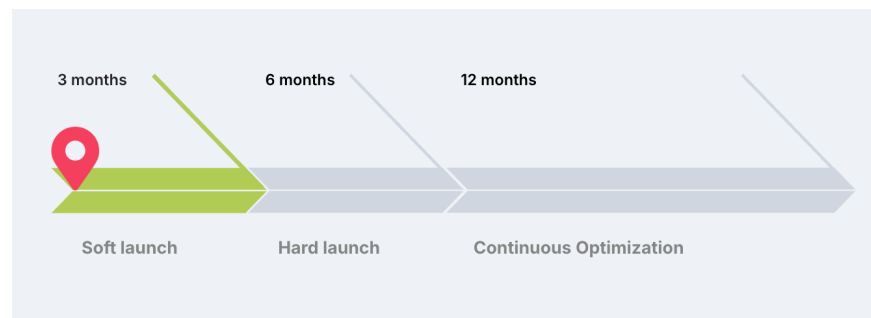
3, 6 and 12 months Goals

*"If you don't know where you are going,
any road will take you there"*

– Alice in wonderland

It's crucial that **you gain clarity on the business goals you want to accomplish** with Sunvoy and what the three, six and twelve month plan to implementation looks like.

Only this way you can ensure that both you, your employees and your company can get the most out of your investment into Sunvoy.



Within 3 Months

- **You have "soft" launched Sunvoy within your Company**
- All your new customers automatically get access to the app and see their project through to completion
- **You have set up login reminders to ensure people login**
- Your brand is launched worldwide through the Apple and Google Play Stores
- **Your Project Managers, Sales, Marketing and O&M People have been invited to the app and were trained on how to use Sunvoy for optimal performance**
- Your Customers automatically receive project updates via text and email as their project moves forward
- **You send out a monthly summary report to new customers that have been successfully installed**
- You link to the customer portal from your website

Within 6 Months

- **You have “hard” launched Sunvoy to all of your legacy customers**
- **You are reselling access to Sunvoy at cost or a modest markup as a line item within all of your proposals**
- **You generate Reviews and Referrals in the background via automations and personalized referral pages**
- **You have sent at least two broadcasts, one to generate referrals via the personalized referral page and another to onboard all legacy customers**
- **Monthly reports get send out to all of our customers, both new and existing alike**

Within 12 Months

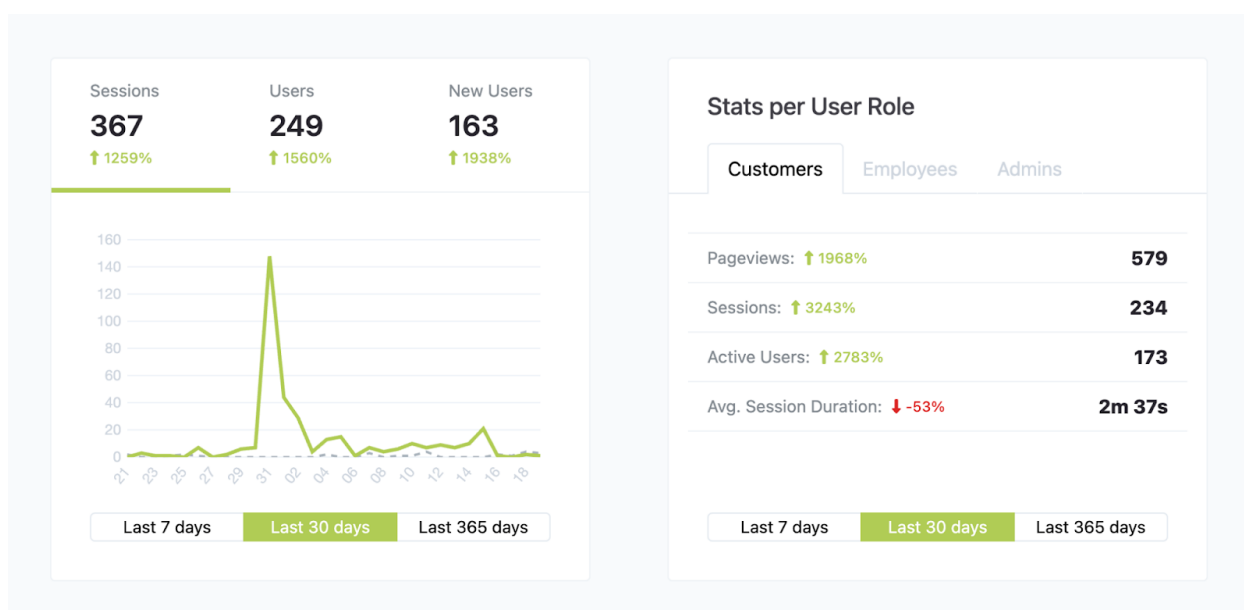
- **You are syncing estimated production data from a design software or your CRM**
- **You are selling lifetime active monitoring through your own “Protect” program that uses /protect resources at your disposal**
- **You have setup an O&M team and service department that uses Sunvoy to proactively monitor & troubleshoot**
- **You use the /monitoring and /reviews landing pages in your marketing**
- **Your Sales People use Sunvoy to signal prospective customers the size of your company, show nearby systems and provide other type of social proof**
- **Your Project Managers walk customers through the app and upload relevant documents on their “Permission to Operate” calls**
- **You are in touch with your account manager every quarter to let him know about your current challenges and how Sunvoy can help solve them or support your business**

Control Implementation via your Dashboard



Sessions, Users and New Users

Some software companies might intentionally hide this from you, but **Sunvoy transparently shares with you everything necessary to check how successful your company is in its adoption.** If you navigate to the Dashboard you can see exactly **how many users have been logging into your app** over various time frames and how it compares to different periods and across different segments.



Most relevant Events

Sunvoy also summarizes for you the most important events happening within your app over various time frames, such as the number of pageviews, how many emails have been sent or how many referrals have been generated within the “Events” Widget.

Other KPIs

Sunvoy’s dashboard will tell you at a quick glance how your company is doing, disclosing the total number of systems installed, projects signed and how those numbers have **grown month over month or year over year**.

It will also tell you where most of your construction projects are currently stuck at and give you a basic idea of how your solar fleet is doing by aggregating inverter error codes and comparing estimated vs. actual performance data.

How to rally your Team

By now all of your [Sales, Marketing, Project Managers](#) and [O&M Team Members](#) should have received training and materials individualized for their respective area.

All of the exclusive training manuals included specific action items on the very last page that you should follow up on and make sure your team has completed.

Leadership and urgency needs to come from the top. If you don't make Sunvoy's implementation a top priority then your team won't make it either.

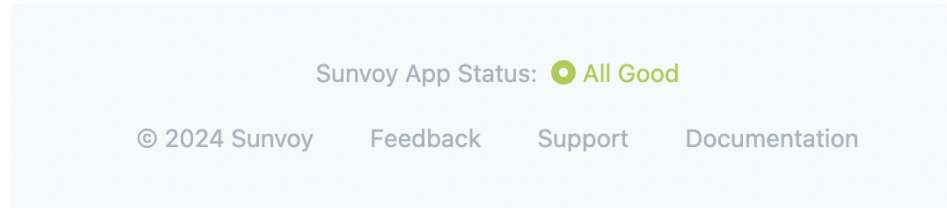


Most important Items for your team:

- ☐ Make sure your app is published in Apple & Google App Stores
- ☐ Enable Automation for generating Referrals & Reviews
- ☐ Add access to [Sunvoy as a line item at cost or markup](#) to your proposals
- ☐ Discuss the possibility of [selling lifetime active monitoring](#)
- ☐ Make sure to enable the monthly reporting under Settings » Messaging » Monthly Report
- ☐ Make sure to [onboard all of your legacy customers](#) via a Broadcast
- ☐ Make sure you are using marketing resources & landing pages
- ☐ Link to the app from your website

Other Resources

After logging into your app you can scroll down to the Footer Area and find additional resources:



Feedback & Feature Request

Something is missing or you got a great idea for a new feature in Sunvoy? Then just click on "Feedback" within the Footer Area to get access to a public forum that all installers that use Sunvoy worldwide use to pitch in. You can see if another installer already had the same idea, give your vote on existing ideas or submit your own.

Documentation

The first place to reach out to if you have a question or would like to learn more about a particular feature is the documentation. It has two separate sections for administrator and employee users, and also contains a section with frequently asked questions on how to troubleshoot issues. If you still need help please use:

Help & Support

Did you find a bug, is something not working as expected or do you simply have a question about a particular feature that was not answered within the documentation? Then click on "Support" and you will be directly in touch with our customer success team that is there to help you at every step of your journey with Sunvoy. You can as well write at anytime to support@sunvoy.com

Time to take ACTION

At this point you and your team should have all of the necessary information. **Now it's time to take action and apply the knowledge to make sure your company gets the most out of Sunvoy.**

Just follow this Checklist:

Checklist

- ☒ ~~Setup your Sunvoy App~~
- ☒ ~~Read through this Training~~
- ☐ Go [checkout your companies Dashboard](#)
- ☐ Make sure your app is published in Apple & Google App Stores
- ☐ Enable Automations for generating Referrals & Reviews
- ☐ Add access to [Sunvoy as a line item at cost or markup](#) to your proposals
- ☐ Discuss the possibility of [selling lifetime active monitoring](#)
- ☐ Make sure to enable the monthly reporting under Settings » Messaging » Monthly Report
- ☐ Make sure to [onboard all of your legacy customers](#) via a Broadcast
- ☐ Make sure you are using marketing resources & landing pages
- ☐ Follow up with your team to make sure they have completed their respective action items
- ☐ Link to the app from your website